

REDISCOVERING YOUR IDENTITY

Reconnect With Your Values, Purpose, And Passions Now

| | YES | NO |
|--|--------------------------|--------------------------|
| 1 Have you taken time to reflect on who you are outside of your former job or title? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 Do you have personal interests or passions that you're actively exploring in retirement? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 Have you created a new sense of daily structure or rhythm that feels meaningful to you? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 Do you engage in activities that reflect your core values and beliefs? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 Have you joined any groups, classes, or volunteer efforts that align with your interests? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 Are you nurturing relationships that support who you are becoming, not just who you were? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 Do you feel comfortable introducing yourself without referencing your past career? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 Have you created personal goals or challenges that give you a sense of growth and achievement? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 Do you give yourself permission to try new things, even if they're outside your comfort zone? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 Have you embraced retirement as an opportunity to evolve and rediscover what fulfills you? | <input type="checkbox"/> | <input type="checkbox"/> |

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
RETIREMENT READINESS

What Your Answers Might Mean:



7–10 Yes Answers: You Are Redefining Yourself With Clarity And Confidence: You've embraced the transition and are actively building a fulfilling identity beyond your professional life.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You've begun the journey of self-discovery, but a few more intentional steps will help you feel more grounded and whole.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without reconnecting to your identity, retirement can feel aimless—now is the time to explore what truly defines and inspires you.